



28 Feb.2018

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	10,496	(0.6) %	13.6 %
BSE SENSEX	34,346	(0.3) %	14.2 %
CNX BANK	25,384	0.0 %	17.8 %
CNX MIDCAP	19,682	0.0 %	13.6 %
CNX SMALLCAP	8,368	0.0 %	18.3 %

GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	25,410	(1.2) %	2.4 %
S&P 500	2,744	(1.3) %	1.8 %
FTSE 100	7,282	(0.1) %	(4.8) %
HANG SENG	31,269	(0.7) %	2.5 %
NIKKEI	22,390	1.1 %	(4.7) %
SHANGHAI COMPOSITE	3,292	(1.1) %	(1.7) %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	64.89	0.2 %	1.9 %
EUR/USD	1.22	(0.6) %	1.8 %
GBP/USD	1.39	(0.5) %	2.9 %
USD/JPY	107.23	0.3 %	(4.9) %
USD/AUD	1.28	0.6 %	0.3 %
USD/SGD	1.32	0.4 %	(0.8) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	64	0.6 %	5.9 %
Gold(INR/10g)	30,496	(0.2) %	3.9 %
Gold Comex(USD/oz)	1,336	0.4 %	2.1 %
SILVER(INR/1Kg)	38,449	(0.2) %	(0.4) %
Aluminium(USD/MT)	2,189	(1.0) %	(3.0) %
Copper(USD/MT)	7,111	0.5 %	(1.0) %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	2.9	(0.0) %	0.4 %

Global Economy: Jerome Powell, the new chairman of the Federal Reserve, in testimony before Congress, said that the Fed planned to continue increasing its benchmark interest rate only gradually. The Conference Board said its consumer confidence index jumped to 130.8 in February from a downwardly revised 124.3 in January. Eurozone economic confidence slipped to a 3-month low in February, survey data from the European Commission showed Tuesday. The economic sentiment index slipped to 114.1 in February from 114.9 in the previous month. The softening of the euro-area indicator resulted from decreases across all sectors except for services, the survey showed. Australia's consumer confidence improved during the week ended February 25, a weekly survey compiled by the ANZ bank and Roy Morgan Research showed. The consumer confidence index rose 2.3% to 117.9 from 115.3 in the preceding week.

Global Equities: US markets slipped on profit selling after recent gains. European stocks were lackluster amid weak economic data.

Indian Economy: The total revenue collection under GST for the month of January, till February 25, stood at Rs 86,318 crore, witnessing a flat performance on month. Rs 86,703 crore was collected in December 2017. A total of 1.03 crore taxpayers have been registered under GST so far till 25th Feb, 2018. So far, 17.65 lakh dealers got registered as Composition Dealers, according to Ministry of Finance.

Equity Markets: Domestic stocks witnessed modest losses, snapping two-day gains, in a volatile session of trade yesterday. Banks and realty stocks witnessed sharp losses. Metal shares declined. Some media reports suggested that the government is planning to ease rules for foreign portfolio investors (FPI), as it seeks to attract more investments into India. As part of the plan, the government will reportedly reduce the time required for FPIs to register in India, introduce a single-window clearance for them and allow foreign banks to trade on behalf of their clients without registering.

Corporate News: IndusInd Bank announced its partnership with Ripple, the enterprise blockchain solution for global payments, to facilitate payments into and out of India. Cement demand in India is likely to grow about 4.5% in 2018-19 on the back of pick-up in housing segment, and higher infrastructure spend, rating agency ICRA said, according to media reports. Domestic cement production during April-December 2017-18 stood at 216.5 million metric tonne (MMT), higher by 2.7% compared to 210.8 MMT during the same period of previous financial year. Cipla and Roche Pharma India announced that the two companies have entered in to an agreement under which Cipla will promote and distribute tocilizumab (Actemra) and Syndyma, the 2nd brand of Roche's cancer therapy, bevacizumab (Avastin) in India.



FUND FLOWS

	LATEST	MTD	YTD
FII(USD mm)	(172.4)	(95.7)	7.1
MF(INR cr)	1,465.6	723.3	557.3

MARKET TURNOVER

	LATEST	AVG MTD	AVG YTD
Cash(INR cr)	31,428	36,311	33,393
F&O(INR cr)	555,471	847,106	649,333

MARKET VOLATILITY

	LATEST	AVG MTD	AVG YTD
CBOE VIX	15.8	22.8	11.8
NSE VIX	13.9	16.4	12.8

NSE INDICES / SECTORAL PERFORMANCE

	LATEST	% 1D	% YTD		LATEST	% 1D	% YTD
Banks	25,384	(1.2) %	17.8 %	Energy	13,992	0.6 %	18.4 %
IT	12,747	0.3 %	20.3 %	Pharma	9,023	(0.5) %	(14.1) %
Metals	4,037	(0.9) %	30.0 %	Finance	10,562	(1.1) %	19.7 %
Auto	11,165	(0.1) %	12.5 %	PSU	3,057	(3.5) %	(13.3) %
FMCG	26,728	0.3 %	13.1 %	Real Estate	327	(1.7) %	49.3 %

NSE MOVERS AND SHAKERS

TOP GAINERS	LATEST	% 1D	% YTD	TOP LOSERS	LATEST	% 1D	% YTD
Avenue Sup	1,355	4.9 %	113.6 %	Punjab Nat	98	(12.2) %	(34.4) %
Petronet L	250	2.7 %	20.6 %	Ambuja Cem	251	(4.4) %	5.8 %
Godrej Con	1,091	2.4 %	28.7 %	Oracle Fin	3,871	(3.3) %	2.3 %
Idea Cellu	84	2.4 %	(0.9) %	Power Fin.	107	(2.7) %	(27.3) %
Dr Reddy's	2,236	1.9 %	(18.5) %	S A I L	84	(2.6) %	33.5 %

EVENTS CALENDAR

EVENT	DATE	TIME(GMT)	REGION	ACTUAL	PREVIOUS VALUE
AiG Performance of Manufacturing Index (FEB)	28-02-2018	22:30	AUD	-	58.7
CBA Australia PMI Mfg (FEB)	28-02-2018	22:00	AUD	-	55.4
CoreLogic House Px (MoM) (FEB)	28-02-2018	23:00	AUD	-	(0.005)
Private Sector Credit (MoM) (JAN)	28-02-2018	00:30	AUD	-	0.003
Private Sector Credit (YoY) (JAN)	28-02-2018	00:30	AUD	-	0.048
Industrial Product Price (MoM) (JAN)	28-02-2018	13:30	CAD	-	(0.001)
Raw Materials Price Index (MoM) (JAN)	28-02-2018	13:30	CAD	-	(0.009)
Credit Suisse Survey Expectations (FEB)	28-02-2018	09:00	CHF	-	34.5
KOF Leading Indicator (FEB)	28-02-2018	08:00	CHF	-	106.9
Composite PMI (FEB)	28-02-2018	01:00	CNY	-	54.6
Manufacturing PMI (FEB)	28-02-2018	01:00	CNY	-	51.3
Non-manufacturing PMI (FEB)	28-02-2018	01:00	CNY	-	55.3
Euro-Zone Consumer Price Index Core (YoY) (FEB A)	28-02-2018	10:00	EUR	-	0.01
Euro-Zone Consumer Price Index Estimate (YoY) (FEB)	28-02-2018	10:00	EUR	-	0.013
French Gross Domestic Product (QoQ) (4Q P)	28-02-2018	07:45	EUR	-	0.006
French Gross Domestic Product (YoY) (4Q P)	28-02-2018	07:45	EUR	-	0.024
German GfK Consumer Confidence (MAR)	28-02-2018	07:00	EUR	-	11
German Unemployment Change (000's) (FEB)	28-02-2018	08:55	EUR	-	-
German Unemployment Claims Rate s.a. (FEB)	28-02-2018	08:55	EUR	-	0.054
BRC Shop Price Index (YoY) (FEB)	28-02-2018	00:01	GBP	-	(0.005)
GfK Consumer Confidence (FEB)	28-02-2018	00:01	GBP	-	(9)
Lloyds Business Barometer (FEB)	28-02-2018	00:01	GBP	-	35
Annualized Housing Starts (JAN)	28-02-2018	05:00	JPY	-	-
BOJ Outright Bond Purchase 1~3 Years	28-02-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 10~25 Years	28-02-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 25 Years~	28-02-2018	01:10	JPY	-	-
BOJ Outright Bond Purchase 3~5 Years	28-02-2018	01:10	JPY	-	-
Capital Spending (4Q)	28-02-2018	23:50	JPY	-	0.042
Capital Spending and Software (4Q)	28-02-2018	23:50	JPY	-	0.042



Company Profits (4Q)	28-02-2018	23:50	JPY	-	0.055
Company Sales (4Q)	28-02-2018	23:50	JPY	-	0.048
Construction Orders (YoY) (JAN)	28-02-2018	05:00	JPY	-	(0.081)
Foreign Buying Japan Bonds (23 FEB)	28-02-2018	23:50	JPY	-	-
Foreign Buying Japan Stocks (23 FEB)	28-02-2018	23:50	JPY	-	-
Housing Starts (YoY) (JAN)	28-02-2018	05:00	JPY	-	(0.021)
Japan Buying Foreign Bonds (Yen) (23 FEB)	28-02-2018	23:50	JPY	-	-
Japan Buying Foreign Stocks (Yen) (23 FEB)	28-02-2018	23:50	JPY	-	-
Loans & Discounts Corp (YoY) (JAN)	28-02-2018	23:50	JPY	-	0.0277
Vehicle Production (YoY) (JAN)	28-02-2018	04:00	JPY	-	0.013
ANZ Activity Outlook (FEB)	28-02-2018	00:00	NZD	-	15.6
ANZ Business Confidence (FEB)	28-02-2018	00:00	NZD	-	(37.8)
ANZ Job Advertisements (MoM) (FEB)	28-02-2018	21:00	NZD	-	0.031
Terms of Trade Index (QoQ) (4Q)	28-02-2018	21:45	NZD	-	0.007
Chicago Purchasing Manager (FEB)	28-02-2018	14:45	USD	-	65.7
Core PCE (QoQ) (4Q S)	28-02-2018	13:30	USD	-	0.019
DOE Cushing OK Crude Inventory (23 FEB)	28-02-2018	15:30	USD	-	-
DOE U.S. Crude Oil Inventories (23 FEB)	28-02-2018	15:30	USD	-	-
DOE U.S. Distillate Inventory (23 FEB)	28-02-2018	15:30	USD	-	-
DOE U.S. Gasoline Inventories (23 FEB)	28-02-2018	15:30	USD	-	-
Gross Domestic Product Annualized (QoQ) (4Q S)	28-02-2018	13:30	USD	-	0.026
Gross Domestic Product Price Index (4Q S)	28-02-2018	13:30	USD	-	0.024
MBA Mortgage Applications (23 FEB)	28-02-2018	12:00	USD	-	(0.066)
Pending Home Sales (MoM) (JAN)	28-02-2018	15:00	USD	-	0.005
Pending Home Sales (YoY) (JAN)	28-02-2018	15:00	USD	-	(0.018)
Personal Consumption (4Q S)	28-02-2018	13:30	USD	-	0.038
Revisions: Pending Home Sales	28-02-2018	15:00	USD	-	-

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